



OPM AND DAS PRESENT

**UNDERSTANDING STATE
PROCUREMENT AUTHORITIES AND
PROCESSES**

WEDNESDAY FEBRUARY 24, 2021

TODAY'S TRAINING ROADMAP



What is Procurement?

What is competitive procurement?

Who oversees procurement in the State of CT?

How do I procure goods and contractual services?

How do I procure professional and human services?

How can I tell what kind of procurement I need to do?

What do I do if I need help with procurement in the future?



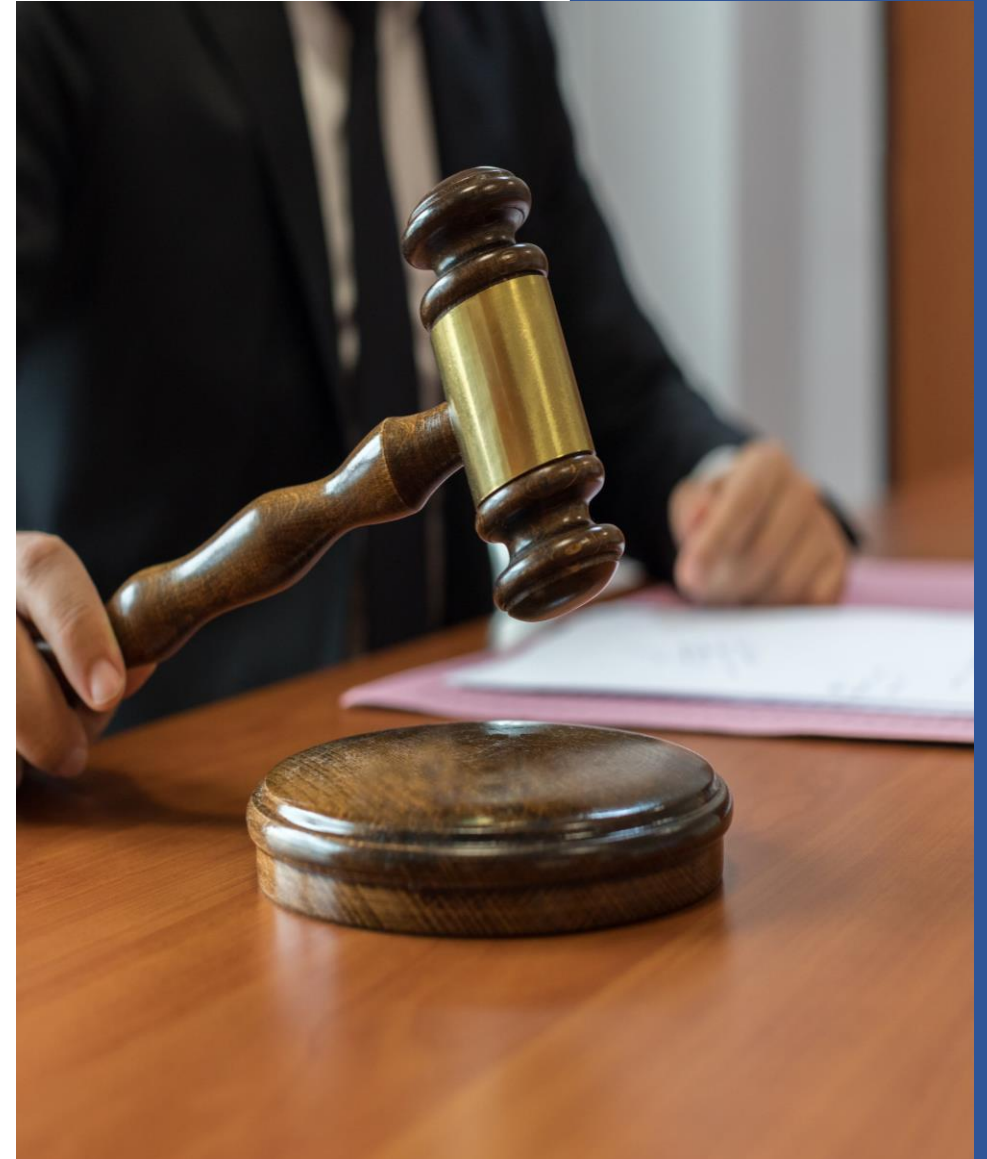
WHAT IS PROCUREMENT?

SOURCING AND ACQUIRING THE GOODS AND SERVICES THE STATE NEEDS TO DO BUSINESS

- Entire process from identifying a need to disposing of old items
- Get the best quality goods and services at the best prices
- Address socio-economic issues and challenges in the state

WHY ARE THERE SO MANY RULES FOR PROCUREMENT?

- Competitive process required
- Uses *public* funds, so we have to spend carefully
- Avoid conflict of interest and unethical conduct
- Leverage purchasing power to negotiate best prices
- Hold vendors accountable for desired outcomes





WHAT IS *COMPETITIVE* PROCUREMENT?

PROCESS BY WHICH THE STATE LOOKS FOR THE BEST COST OR BEST VALUE OPTION TO OBTAIN GOODS AND SERVICES NEEDED

- Solicitation must be public, open, and fair
- Anyone can see and respond to it
- Transparent Process

APPROVAL MUST BE GRANTED TO WAIVE THE COMPETITION PROCESS, RESULTING IN A SOLE-SOURCE PROCUREMENT.

TYPES OF COMPETITIVE PROCUREMENT



QUOTATIONS



BIDS



PROPOSALS



NEGOTIATED
AGREEMENTS

HOW DO I INITIATE A PROCUREMENT IN CONNECTICUT?

IT DEPENDS ON WHAT TYPE OF
GOOD OR SERVICE YOU ARE
PROCURING.



CONNECTICUT PROCUREMENT AUTHORITIES

WHAT IS BEING PROCURED?	WHICH AGENCY IS RESPONSIBLE?
Products/Goods Contractual Services (Including IT and Telecomm)	DAS Procurement Services
Professional Services Health and Human Services	Individual agency with OPM/Finance Oversight
Roadway Construction	DOT
Building Construction	DAS Construction Services
Real Property	DAS Property Leasing and Transfer

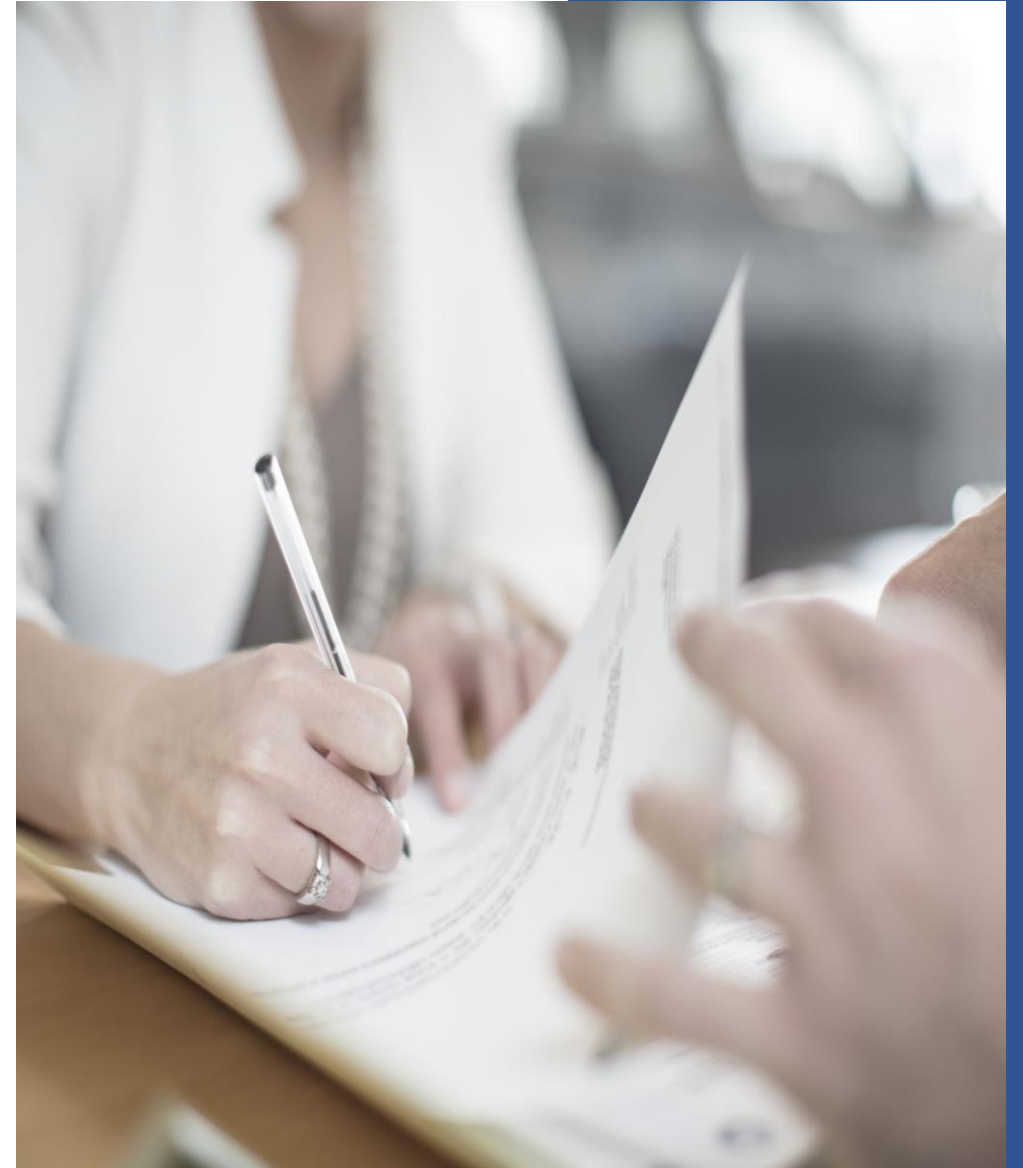


DAS PROCUREMENT

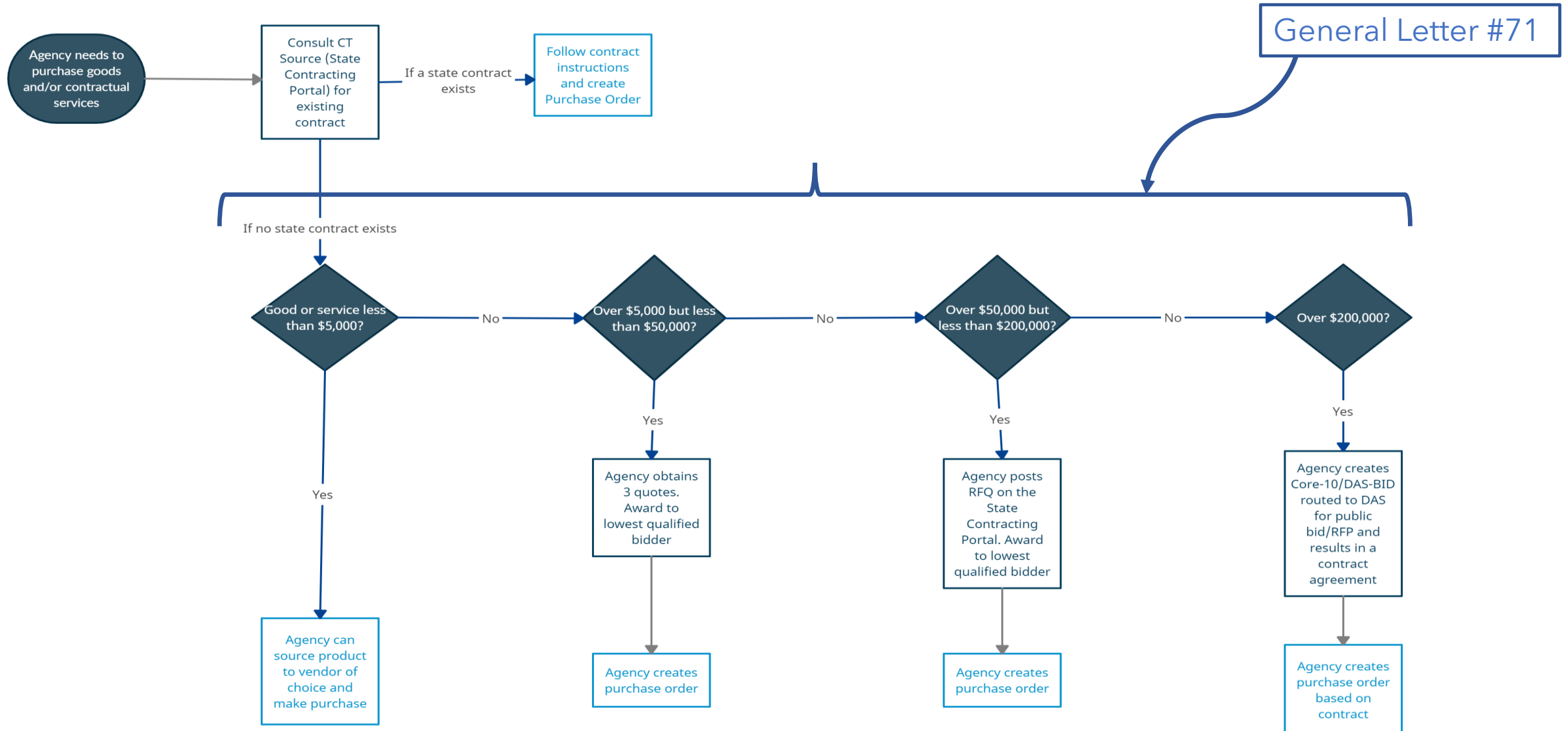
ROLES AND PROCESSES

WHAT IS THE ROLE OF DAS IN PROCUREMENT?

- Sets procurement policy and procedures
- Administers contracts for all products and contractual services over \$200,000
- Delegates procurement authority to agencies for purchases less than \$200,000 via General Letter 71 (GL-71)



PROCURING A GOOD OR CONTRACTUAL SERVICE



USING A STATE CONTRACT



USING CT-SOURCE

[CT.gov Home](#) / [Department of Administrative Services](#) / [For Agencies and Municipalities](#) / [DAS Procurement Services](#) / [New Initiatives](#) / [CTsource](#)



[Log in to CTsource](#)

Registration

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[Registration Resources](#) >

[Supplier Registration and Portal User Guide](#) 📄

Bid Board

[CTsource Bid Board](#) >

[Bid Board Resources](#) >

[Bid Board User Guide](#) 📄

[Supplier Solicitation Response and Addenda Guide](#) 📄

Contract Board

[CTsource Contract Board](#) >

[Contract Board Resources](#) >

[Contract Board User Guide](#) 📄

WHAT CONTRACTS ARE OUT THERE?



OFFICE
SUPPLIES



VEHICLES



IT EQUIPMENT



JANITORIAL
SERVICES

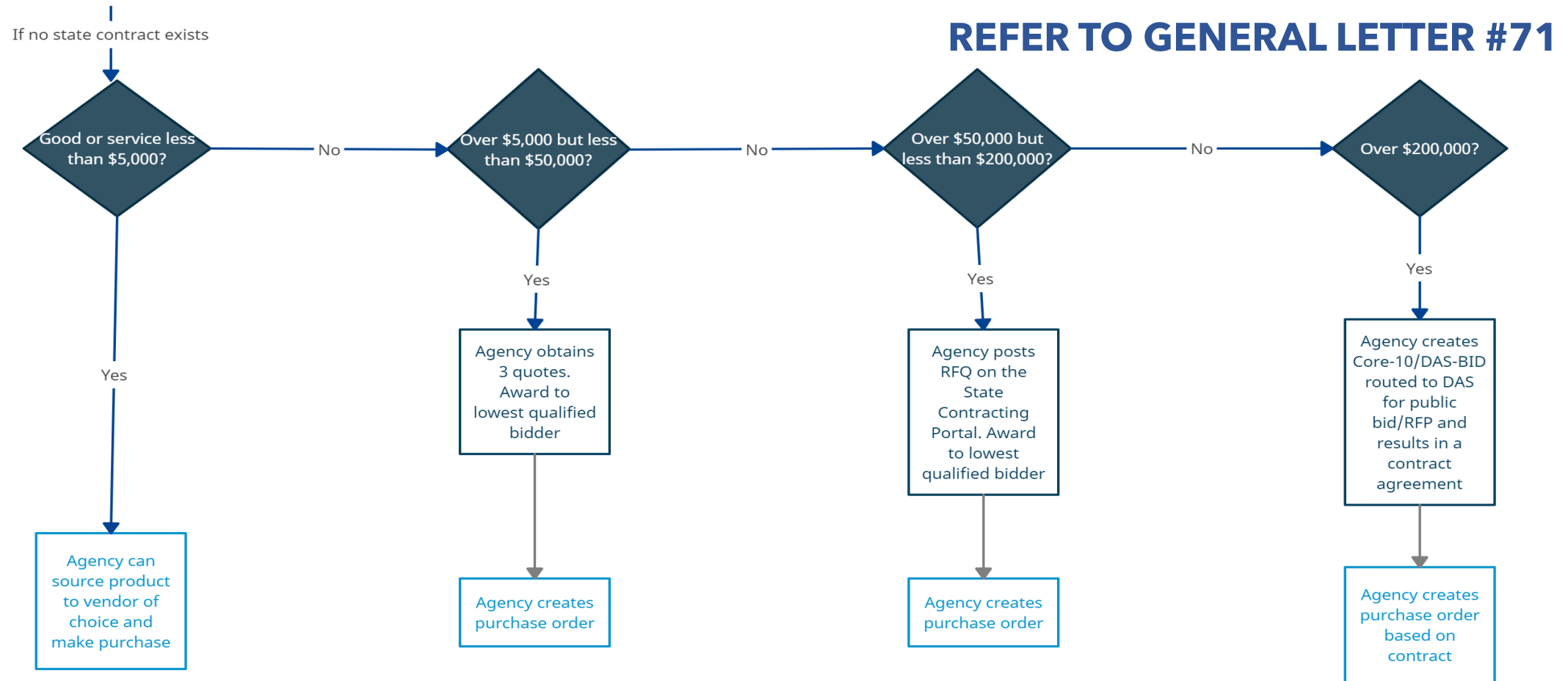
...AND THOUSANDS MORE



WHY USE A STATE CONTRACT?

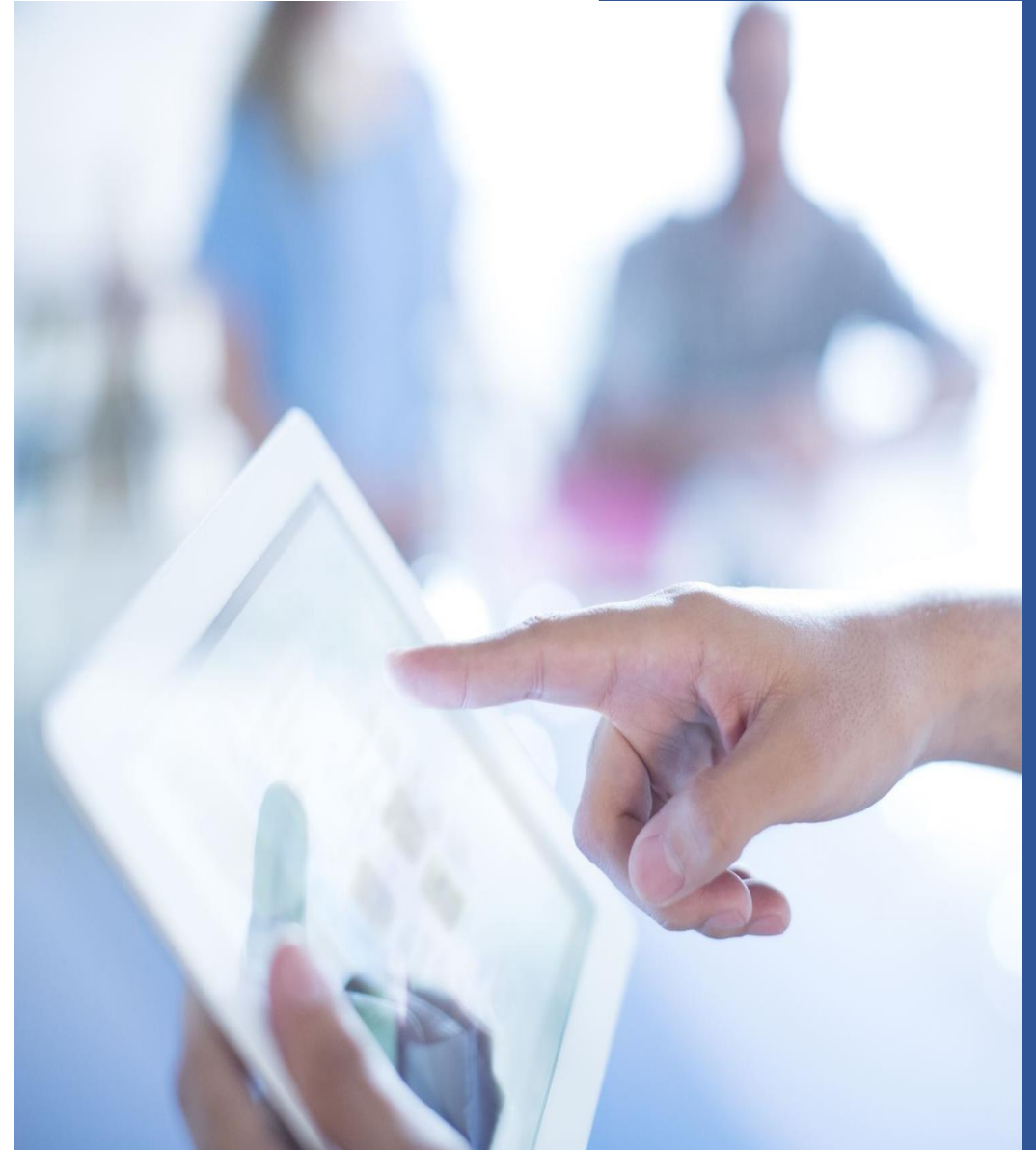
- Makes purchasing easy
- Ensures statutory compliance
- Purchasing power
- Helps you meet set-aside goals
- Environmentally preferable products (EPPs)

WHAT DO I DO IF A STATE CONTRACT DOES NOT EXIST?



WHY DO I NEED TO USE THE STATE CONTRACTING PORTAL?

CGS 4e-13 requires all executive branch agencies, including colleges and universities, to post all bids, RFPS, and all result contracts and agreements on the State Contracting Portal.



WHO DO I CONTACT AT DAS FOR HELP?



For State contract assistance, contact the Contract Specialist on CT-Source contract page



Call DAS Procurement main line:
860-713-5095
for further guidance



OPM/FINANCE PROCUREMENT

ROLES AND PROCESSES

WHAT IS THE ROLE OF OPM IN PROCUREMENT?

- Establishes standards for procurement of professional and human services
- Approves contracts and contract amendments in some circumstances
- Produces reports
 - Annual report on all contracting activity
 - Monthly report on competition waivers
 - Three-year procurement plans



WHAT TYPES OF CONTRACTS DOES OPM OVERSEE?

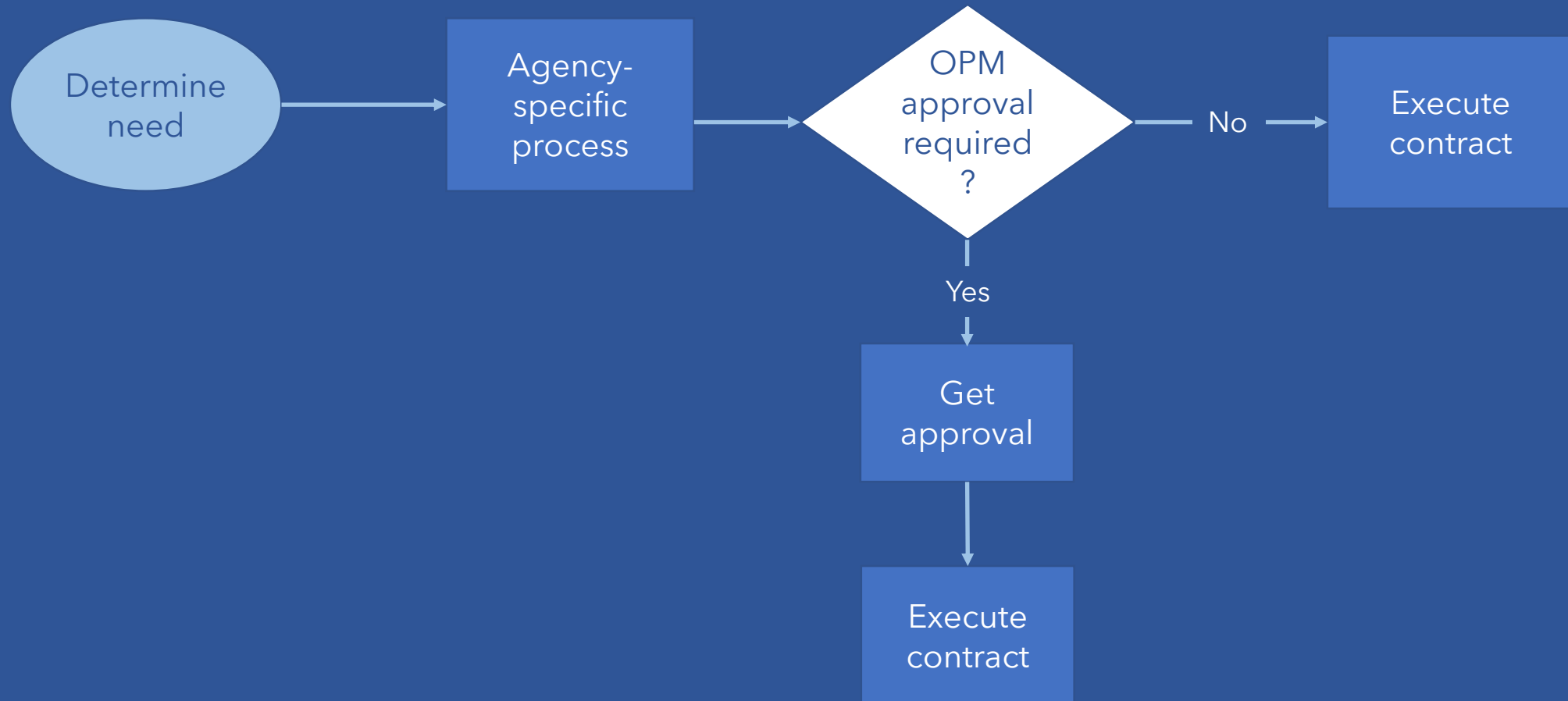


PERSONAL
SERVICE
AGREEMENTS
(PSA)



PURCHASE OF
SERVICE
CONTRACTS
(POS)

PROCURING A PROFESSIONAL OR HUMAN SERVICE



WHEN DO I NEED OPM APPROVAL?

APPROVAL REQUIRED

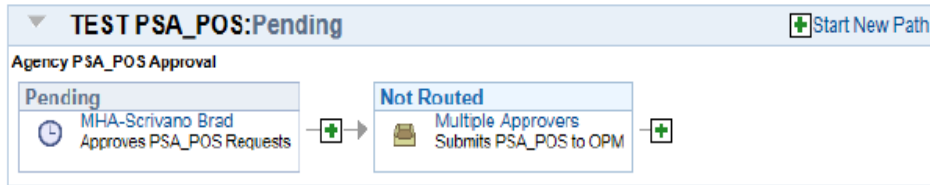
- Over \$50,000
- Over 1 year in length
- Over \$20,000 and not competitive
- PSA with an individual
- Most amendments

NO APPROVAL REQUIRED

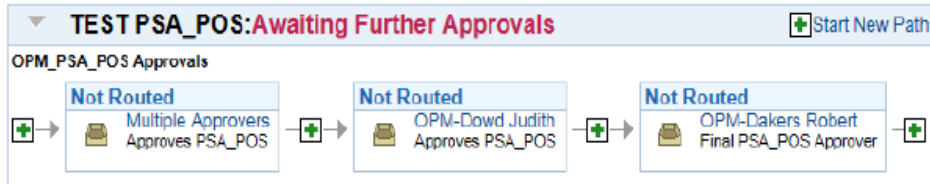
- Up to \$20,000 and term of up to 1 year
- Up to \$50,000, up to 1 year in length AND competitive



Agency PSA_POS Approval



OPM_PSA_POS Approvals

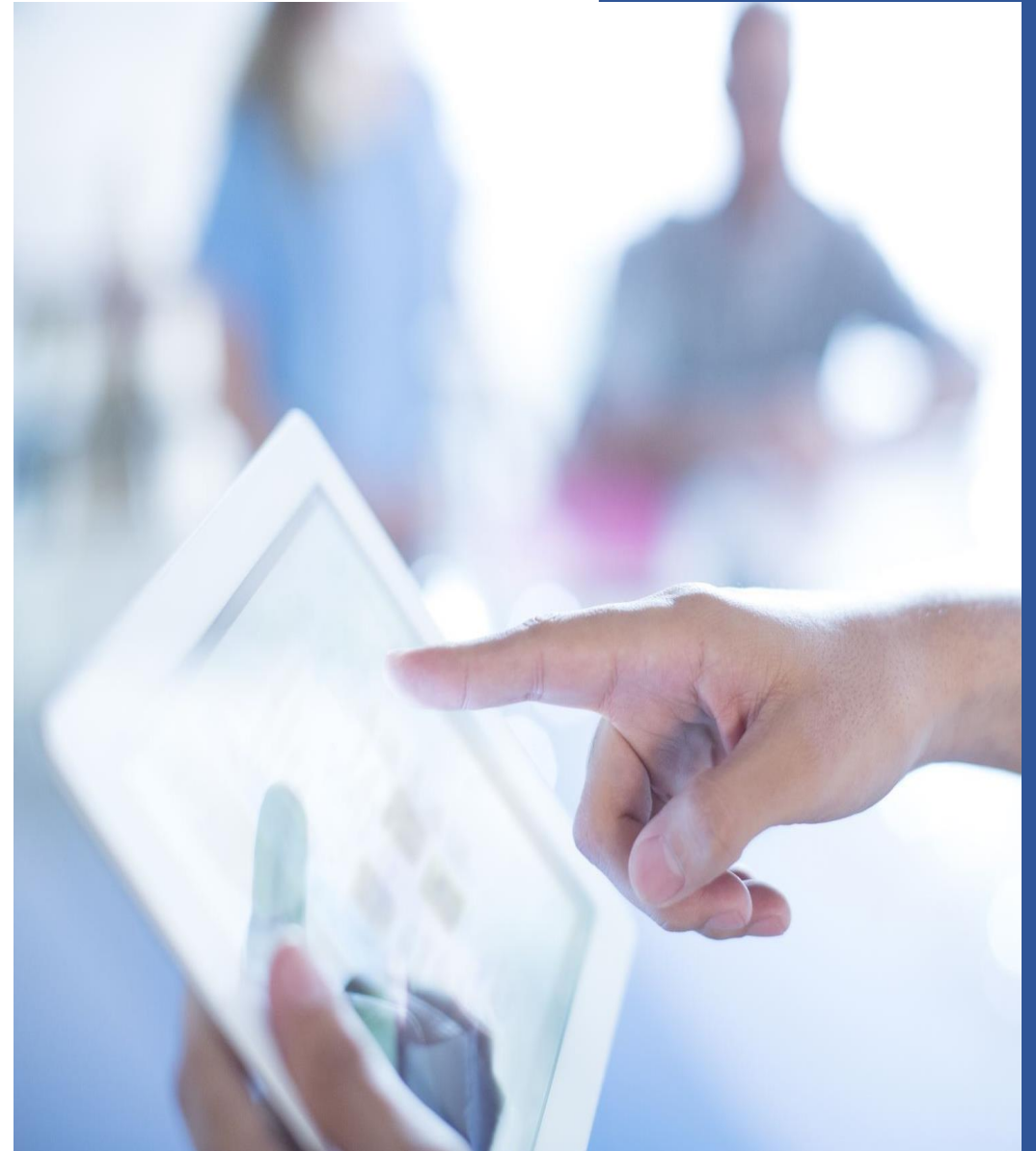


HOW DO I GET OPM APPROVAL?

1. Register vendor in Core-CT
2. Submit a requisition
3. Agency authority approves requisition in Core
4. OPM/Budget reviews and approves
5. OPM/Finance reviews and approves

POSTING RFPS AND CONTRACTS

Reminder: CGS 4e-13 requires all executive branch agencies, including colleges and universities, to post all bids, RFPS, and all resulting contracts and agreements on the State Contracting Portal.



WHO DO I CONTACT AT OPM/FINANCE FOR HELP?

①

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②

**Colin Erhardt & Lars
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③

Kimberly Kennison

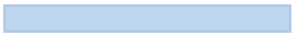
Executive Financial
Officer
Kimberly.kennison@ct.gov

WHAT IS THE GPL?



HARVARD Kennedy School
Government Performance Lab

HELP CITIES AND STATES USE PROCUREMENT AND
CONTRACTS AS STRATEGIC TOOLS TO MAKE
PROGRESS ON THEIR PRIORITIES AND CHALLENGES



HOW THE GPL CAN HELP

- One-off technical assistance on RFP writing
- Cross-agency collaboration on RFP sprints
- Intensive support on contract implementation and management



WHAT TYPE OF PROCUREMENT IS THIS?

- Office supplies DAS
- Training services PSA
- Group homes for persons with disabilities POS
- Janitorial services DAS
- Executive search firm PSA
- IT consulting services DAS
- Substance abuse treatment services POS
- Guest speaker - notable personality OPM→DAS
- Diversity training OPM→DAS
- Employee assistance services OPM→DAS
- CTECS agreement to use Yardgoats Stadium ?

DAS VERSUS OPM PROCUREMENT

DAS	OPM
Goods/commodities e.g. office supplies, vehicles, IT equipment, food	Health and human services e.g. homeless shelters, substance abuse programs, childcare services
Contractual services e.g. janitorial services, food services, landscaping, snow removal	Professional services e.g. trainers, medical professionals, researchers, actuarial services
IT and telecom services including IT consulting	
Master contracts	
GL-71 exceptions	

MORE HELP CAN BE FOUND ONLINE



[DAS Procurement Agency
Informational Resources](#)

[DAS Procurement Agency
Procurement Manual](#)



[OPM Procurement
Standards](#)

[OPM RFP Template](#)



[Core-CT Job Aids](#)

[Core-CT Help Desk](#)

FOR ADDITIONAL QUESTIONS, CONTACT US!



DAS Contract specialists –
contacts on each
statewide contract

DAS main procurement
line: 860-713-5095



[Julia Fufeld](#) - Procurement
Policy Development
Coordinator

[Kimberly Kennison](#) -
Executive Financial Officer



[Colin Erhardt](#) - GPL Fellow

[Lars Benson](#) - GPL Fellow

QUESTIONS AND ANSWERS

The background of the image is a photograph of the Wisconsin State Capitol building, a large, ornate, light-colored stone structure with a prominent central dome and several smaller spires. The building is partially obscured by a semi-transparent blue rectangular overlay that covers most of the frame. In the foreground, there are green trees and a clear blue sky. The text "THANK YOU!" is centered in the upper half of the blue overlay in a white, sans-serif font.

THANK YOU!

PLEASE FILL OUT OUR [SURVEY](#)